

**DOMINION**  
CAPITAL STRATEGIES



Platform Users

BA-002



## A USER TYPES AND ROLES

There are two types of DCSL Platform users. Roles assigned to users control access and permissions to different Platform functions as set out below.

### **Admin User - Assigned to financial advisers.**

Grants access to all data (accounts, transactions, commissions, reports and conventions statuses) related to your own Clients Portfolio as well to your network, where applicable. It also has rights to create, edit, send transactions to client and handle the tool "Activity".

Admin User profiles can only be created using the name and email address of each of the individuals on whom Due Diligence has been undertaken and approved as part of the Referral Agreement application process. Please list below each of the individuals you require the Admin User profile to be issued to.

	Full name	Email
Admin User #1		
Admin User #2		
Admin User #3		

### **Staff User - Assigned to Operations Executives.**

Grants access to data of accounts and transactions corresponding to the company's Clients' Portfolios' as well as those related to its network, where applicable. It also has rights to create and edit transactions and to handle the tool "Activity". This profile does not allow new clients to be added to the Platform.

Please list below each of the individuals you require the Staff User profile to be issued to.

	Full name	Email
Staff User #1		
Staff User #2		
Staff User #3		

**B SIGNATURES**

**WMI**

Signature:



Date:

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Print name:

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**WMI**

Signature:

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Date:

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Print name:

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**WMI**

Signature:

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Date:

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Print name:

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**ADVISOR**

Signature:

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Date:

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Print name:

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